Matter Management Tables

Basic Matter Management has been added to the standard system. It is a relatively self-contained module, with minimal connections to Contracts and to other standard objects, such as People, Teams, Roles, Groups, and Time Entries

Overview

Matter management is designed for use as a basic repository of matters, with matter files, deadlines, time keeping, and outside resource tracking included. It does not have complex workflows, approvals, or tasks built out-of-the-box, though such functionality can be added and customized as needed.

It also includes a Legal Request function for employees to request help from the legal team. With Legal Requests, employees can ask to have a matter or contract created, ask a question about existing matters or contracts, report an HR or confidential issue, or ask general legal questions. Legal Requests can be completed by the legal team creating a Matter or a Contract, using a button in the request.

There are a few tables specific only to Matter Management: Matters, Matter Files, Matter Deadlines, Matter File Types, and Matter Types. There is also the Time Entries Table, which can be used with other applications.

- Legal Requests Table
- Matters Table
- Matter Types Table
- Matter Files Table
- Matter File Types Table
- Matter Deadlines Table